

Syria Market Monitoring Exercise

February 2017

Cash-Based Responses
Technical Working Group

REACH Informing
more effective
humanitarian action

INTRODUCTION

To understand market functionality in Syria and the ways in which markets cope with challenges created by the conflict, the Cash-Based Responses Technical Working Group (CBR-TWG) and REACH conduct monthly monitoring of key markets throughout the country. In each assessed market, field teams record the prices and stock levels of selected food and non-food items (NFIs) sold by local traders and retailers. Monitored commodities have been identified based on what is typically available, sold and used by an average Syrian household. Many are components of the Survival Minimum Expenditure Basket (SMEB), detailed in the table to the right, which represents the minimum culturally adjusted group of items required to support a six-person Syrian household for one month. The SMEB was created in 2014 and updated in February 2017 to reflect changing household consumption patterns.

This report provides an overview of price ranges and medians for key foods, NFIs and types of fuel across the areas assessed, as well as of water trucking costs and currency exchange rates. To illustrate variation in prices and availability, REACH has used the collected data to map the price of an SMEB in each subdistrict. The cleaned data sets are available on the REACH Resource Centre and are distributed to CBR-TWG partners, as well as to the broader humanitarian community.

WHAT IS THE CASH-BASED RESPONSES TECHNICAL WORKING GROUP?

The Cash-Based Responses Technical Working Group (CBR-TWG) was established in March 2014 to analyse the impact of the ongoing conflict on markets in Syria and guide the implementation of humanitarian cash and voucher programmes within those markets.

METHODOLOGY

Between 13 and 19 February 2017, a network of enumerators affiliated with CBR-TWG members collected detailed information about the availability and prices of key food items, non-food items and fuel, as well as monitoring the prices of private water trucking and smartphone data. Twelve partners (ACTED, CARE/Shafak, Concern, DCA, GOAL, Ihsan, IRC, Mercy Corps, PIN, REACH, Solidarités International and Violet) contributed data from 53 subdistricts across Latakia, Idlib, Aleppo, Deir ez-Zor, ar-Raqqa, al-Hasakeh, Quneitra, and Dar'a governorates. As coverage expanded for the first time in February into the Quneitra and Dar'a governorates, direct comparison to whole-of-Syria figures from previous months, which did not include these governorates, is not advised.

Five survey forms were deployed on KoBo to capture price and stock information from different types of establishments, including grocery stores, fuel traders, currency exchange shops, water trucking services and mobile phone shops, among others. In most cases, enumerators used the KoBoCollect Android app to upload data.

In order to be included in the Market Monitoring Exercise, markets had to be permanent in nature, large enough to support at least two wholesalers, and diverse enough to provide a sufficient variety of goods and commodities. The shops surveyed

CHALLENGES AND LIMITATIONS

Coordinating a cross-border price monitoring exercise via remote management is inherently challenging, as issues of enumerator training, consistent communication and verification of results are harder to resolve. CBR-TWG members have sought to overcome these issues by harmonising procedures and data collection tools to ensure that the data uploaded are as accurate as possible.

CBR-TWG partners closely monitor the security context in the subdistricts where they plan to

within each market had to be housed in permanent structures and had to sell certain items to be eligible for inclusion.

Enumerators were trained on methodology and tools by REACH and CBR-TWG members. Each enumerator assessed three to five shops of each type in the main market in their assigned subdistrict, using surveys to collect information about prices, current product inventory and the time needed to replace current stocks. In subdistricts where direct surveying by enumerators was not possible, data collection was conducted remotely through key informants such as shop owners, suppliers and consumers.

Following data collection, REACH compiled and cleaned all partners' data, normalising prices and cross-checking outliers. The cleaned data was then analysed by commodity and by subdistrict. Prices were divided into quartiles and boxplots were created to help CBR-TWG members understand the distribution of prices in different regions of Syria. In addition, REACH calculated and mapped the median cost of an SMEB in each subdistrict. These calculations were updated to reflect February's revisions to the basket, which included the addition of smartphone data and LPG as well as changes in the quantities of certain items to better reflect household consumption patterns.

collect data and are encouraged not to expose their enumerators to undue risk. In some subdistricts, this means that enumerators cannot collect data from certain communities or neighbourhoods. This was the case in the divided cities of al-Hasakeh and Qamishli, where only markets on one side of the frontline could be surveyed. Partial coverage was reintroduced in the cities of ar-Raqqa and al-Mayadin, but this information was not included in SMEB mapping and analysis due to the incompleteness of the collected data.

ASSESSED GOVERNORATES



SURVIVAL MINIMUM EXPENDITURE BASKET (SMEB) CONTENTS

	Item	Quantity
Food Items	Bread	37 kg
	Bulgur	15 kg
	Chicken	6 kg
	Eggs	6 kg
	Fresh vegetables	12 kg
	Ghee/vegetable oil	7 kg
	Red lentils	15 kg
	Rice	19 kg
	Salt	1 kg
	Sugar	5 kg
Non-Food Items	Tomato paste	6 kg
	Bathing soap	12 bars
	Laundry/dish soap	3 kg
	Sanitary pads	4 packs of 10
Fuel	Toothpaste	2 pieces
	Cooking fuel*	25 L
Water	Water	4500 L
Comms	Smartphone data	1 GB
Other	Float (other costs)**	7.5% total value

* Kerosene in northern Syria; LPG in southern Syria.

** Float was excluded from SMEB calculations due to the commonality of incomplete baskets.

COMMODITY PRICE CHANGES

The median informal US dollar (USD) exchange rate was 528 SYP/USD in February, with a 2.1% increase in the median exchange rate across northern governorates since January. The range of sell rates varied by 34 SYP, with the highest rate in Menbij at 539 SYP/USD and the lowest rate in al-Mayadin at 505 SYP/USD. Median exchange rates were approximately 7 SYP higher in the northwestern governorates than in the south or east.

The median sell rate for the Turkish lira increased from 137 SYP/TRY in January to 144 SYP/TRY in February, which was comparable to its December level and ended a four-month decline. Local exchange rates varied by 16 SYP across all assessed markets. The median sell rate for the Jordanian dinar was 720 SYP/JOD, with a 40 SYP variation in assessed market rates.

Ten food prices varied significantly by region with median cucumber, bread and flour prices showing the largest swings. Cucumber prices in the northwest were 480 SYP/kg, 79% more expensive than the 268 SYP/kg median price in the northeast. Similarly, median bread prices in the northwest and south, at 150 SYP/pack, were 69% more expensive than the 89 SYP/pack median bread price in the northeast. Conversely, flour prices were cheaper in the northwest and south at 150 and 155 SYP/kg respectively, compared to 200 SYP/kg in the east.

Lentils, chicken, onions and bulgur were cheaper in the northwest and priciest in the northeast, with 15-20% variation in the median price between regions. By contrast, tomato paste and tea were cheapest in the northeast and priciest in the northwest, with 20-30% variation in the median prices across regions. One kg of ghee was 50 SYP more expensive in the

MAIN PRICE VARIATIONS

BREAD, FUEL, FLOUR, DISHWASHING LIQUID

south than in either the northwest or northeast, a 7% increase over other regions.

The remaining seven assessed food prices (eggs, vegetable oil, potatoes, salt, rice, sugar and tomatoes) showed either no median prices changes or fluctuations of less than 5% between regions, suggesting minimal local price variation.

Overall, median sanitation and hygiene prices did not significantly change between January and February, despite the inclusion of new subdistricts in the south. Median prices of laundry powder, sanitary pads, and toothpaste stayed the same from last month, and the median price of bathing soap increased by only 20 SYP. For toothpaste, bathing soap and sanitary pads, median price differences by region were 50 SYP or less. A broader variation for 1kg of laundry powder meant the median price was lowest in the northwest at 516 SYP/kg and the highest in the northeast at 600 SYP/kg. Significant regional median price differences were observed for a litre of dishwashing liquid: 200 SYP in the northwest, 300 SYP in the south and 450 SYP in the northeast.

All median fuel prices were far cheaper in the northeast than elsewhere, ranging from 65% cheaper for manually refined petrol to 90% cheaper for government of Syrian (GoS) diesel. Furthermore, median fuel prices were largely more expensive in the south than the northwest, though not by as significant a degree. The exceptions were manually refined kerosene, which was reported unavailable in any market surveyed in the south, and manually refined diesel, which was 60 SYP/litre cheaper in the south and most expensive in the northwest.

Water trucking price data was almost exclusively

MAIN SHORTAGES

KEROSENE, LPG, BREAD, CUCUMBER, CHICKEN

reported in the northwest and southern governorates. The median rate for private water trucking services in Aleppo and Idlib governorates in February was 0.57 SYP/litre of water, similar to the 0.59 SYP/litre January rates reported for the same region. The median rate for February in Quneitra and Dar'a governorates was 0.45 SYP/litre.

ISSUES OF AVAILABILITY

Availability of Survival Minimum Expenditure Basket (SMEB) items in February was similar to that observed in January, with approximately 75% of subdistricts reporting prices for all items in both months, despite the inclusion of seven additional subdistricts in February.

As has been the case since September 2016, kerosene and bread were among the most common SMEB shortages reported. Both LPG and kerosene shortages were reported in the Tel Abiad subdistrict in ar-Raqqa, with enumerators noting a 'fuel crisis' in the community. In Khan Arnaba and Hrak subdistricts, no information on LPG prices was recorded. As LPG is the primary cooking fuel in the south, and kerosene is rarely available, a cooking fuel shortage cannot be confirmed.

Cucumbers were reported unavailable in Idlib city and the Sarin subdistrict of Aleppo. Additionally, no bread prices were recorded in the three communities surveyed in the Tal Tamer, Ya'robiyah, and Tal Hmis subdistricts of al-Hasakeh. In January, four subdistricts reported bread shortages. As with last month, chicken was also reported not available in the one community surveyed in the Lower Shyookh subdistrict in eastern Aleppo, and no prices for chicken were reported in Ras Al Ain subdistrict of al-Hasakeh.

The Tell Abiad subdistrict of ar-Raqqa and Hrak subdistrict of Dar'a both reported fuel shortages of both kerosene and LPG in February. However, regime petrol and manually refined diesel were both accessible. Manually refined petrol was reported available in Tell Abiad but not in Hrak, and regime diesel was available in Hrak but not Tel Abiad.

In the Tal Tamer subdistrict of al-Hasakeh and Khan Arnaba subdistrict of Quneitra, manually refined petrol was confirmed unavailable, but no information on accessibility of LPG was reported. Additionally, no information on fuel or LPG prices was reported from the Tefnaz subdistrict of Idlib or the Ras Al Ain subdistrict of al-Hasakeh. In comparison, five subdistricts reported SMEB fuel shortages in January.

SMEB VALUES

The value of the SMEB is calculated for each assessed subdistrict by calculating the median prices of all SMEB commodities in that subdistrict and multiplying these medians by the number of units that an average northern Syrian household must purchase in a month. In February, it was possible to assemble complete SMEBs for 36 out of 53 assessed subdistricts, compared to 35 out of 46 in January. Due to the retooling of the SMEB index in February, direct comparison is not advised.

Of the 36 complete SMEBs, the cheapest was in Atareb (54,988 SYP, 104.54 USD), with the next five cheapest all in Idlib governorate. The five most expensive SMEBs were all in Dar'a, with the priciest completed SMEB in Jizeh subdistrict (92,200 SYP, 175.29 USD). The most expensive SMEB outside of Dar'a was in Lattakia (74,538 SYP, 141.71 USD).

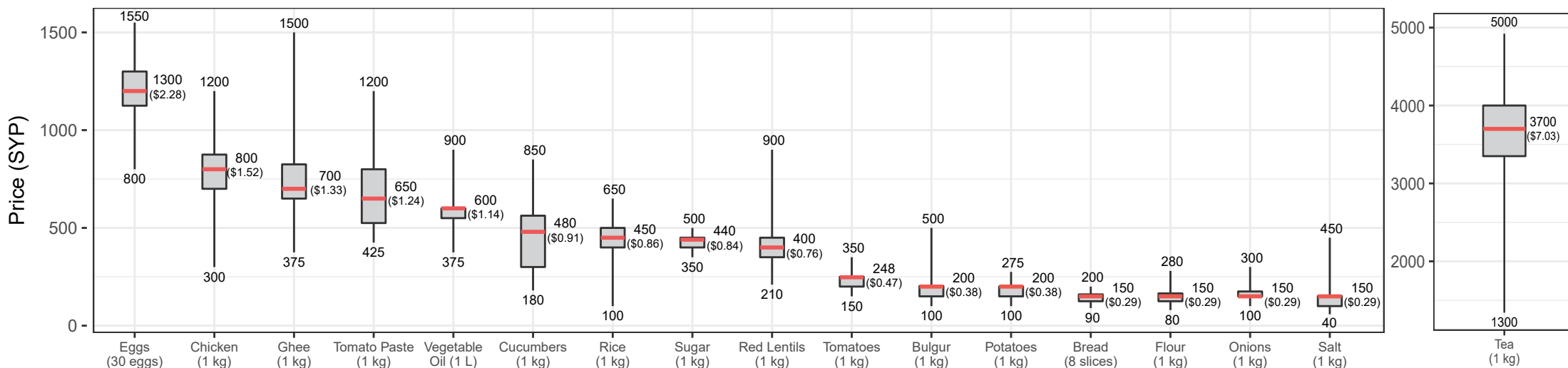
The values of all baskets can be compared using the three regional SMEB maps that follow, though caution should be taken to compare only baskets that are missing the same commodities.

EXCHANGE RATES

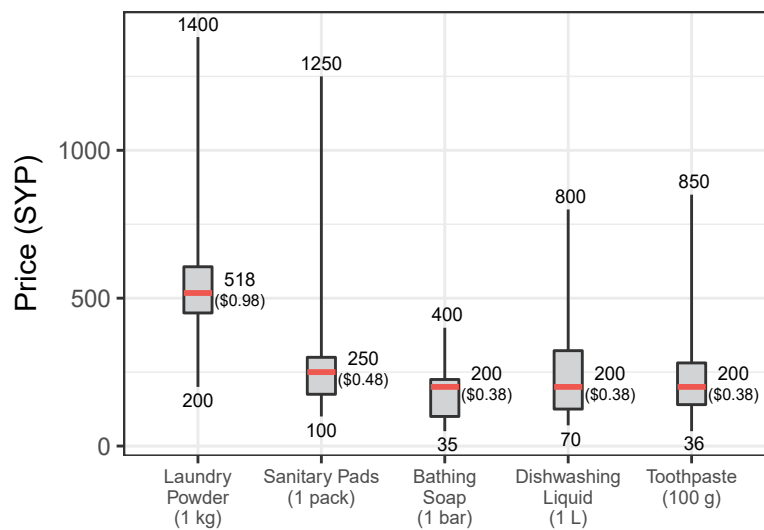
526	144	720
SYP/USD	SYP/TRY	SYP/JOD

Distribution of Commodity Prices: Northwestern Syria

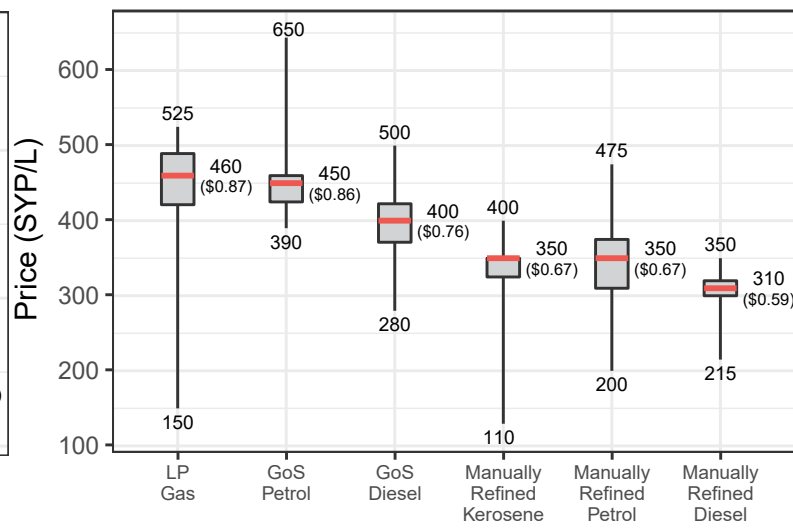
FOOD ITEMS



NON-FOOD ITEMS

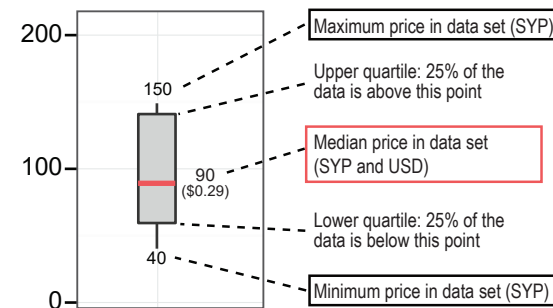


FUEL



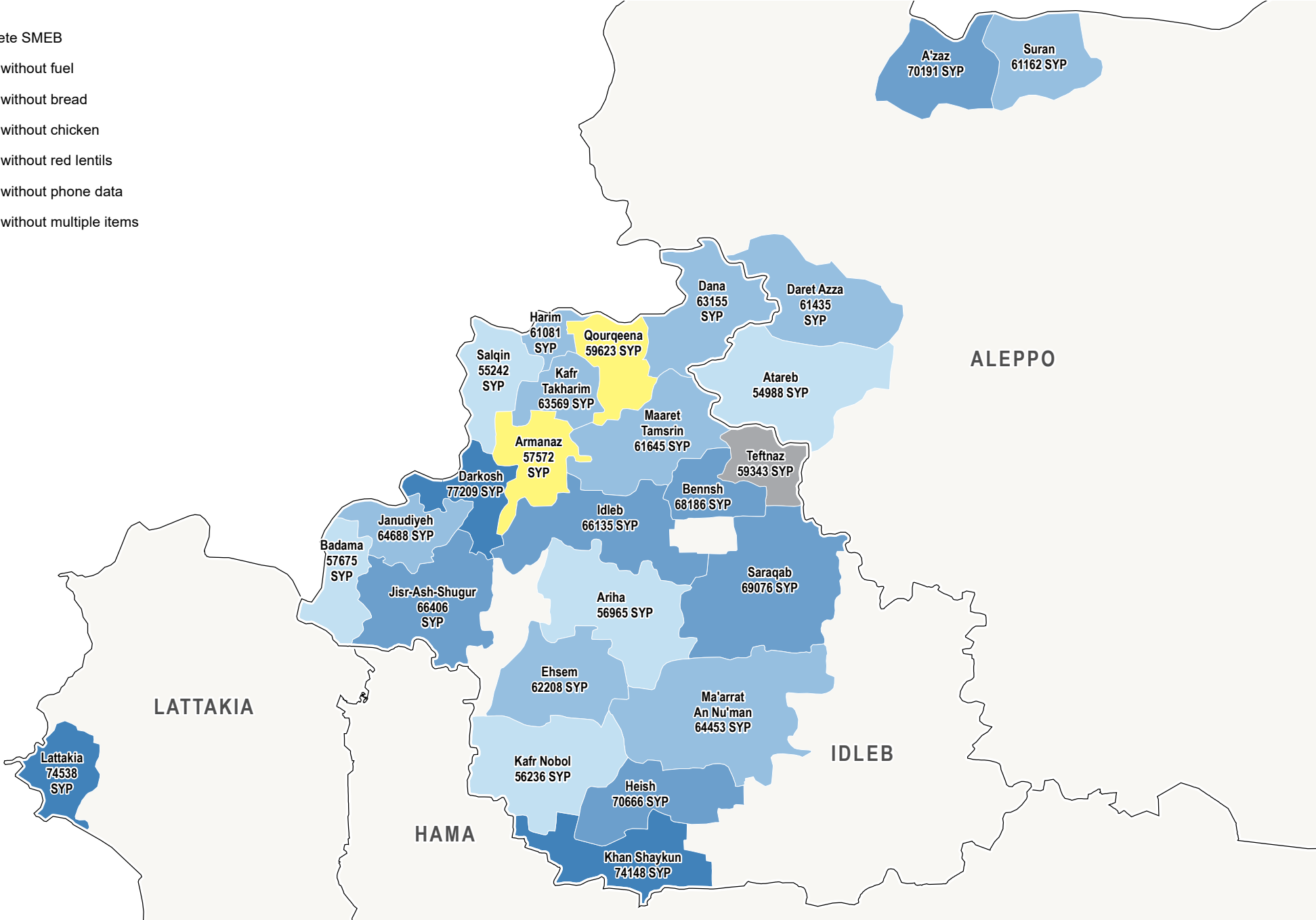
How to read a box plot

Box plots provide a variety of data to aid in understanding the distribution of the data set. Prices are in SYP unless otherwise marked.



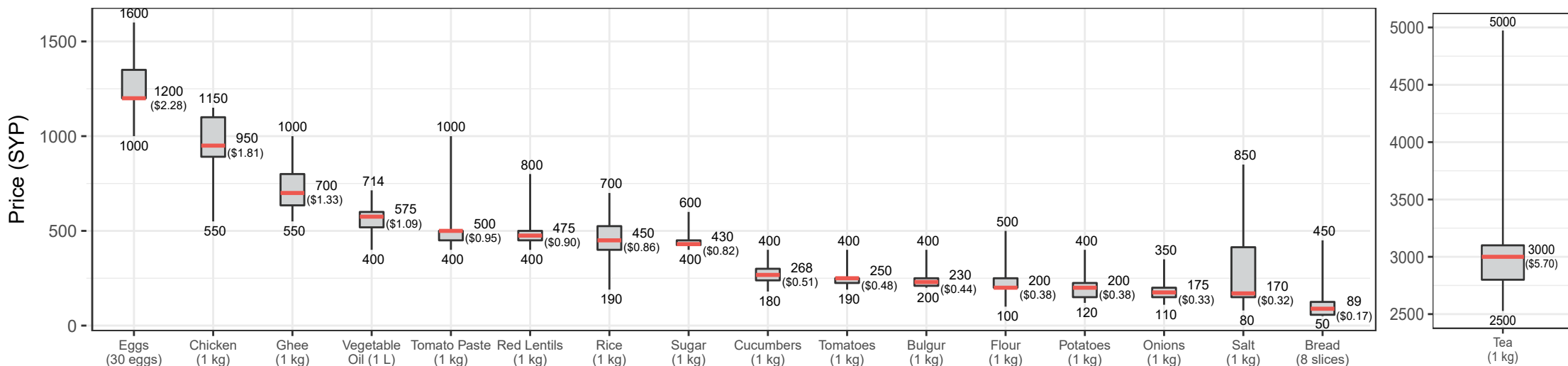
SMEB Prices: Northwestern Syria

- Complete SMEB
- SMEB without fuel
- SMEB without bread
- SMEB without chicken
- SMEB without red lentils
- SMEB without phone data
- SMEB without multiple items

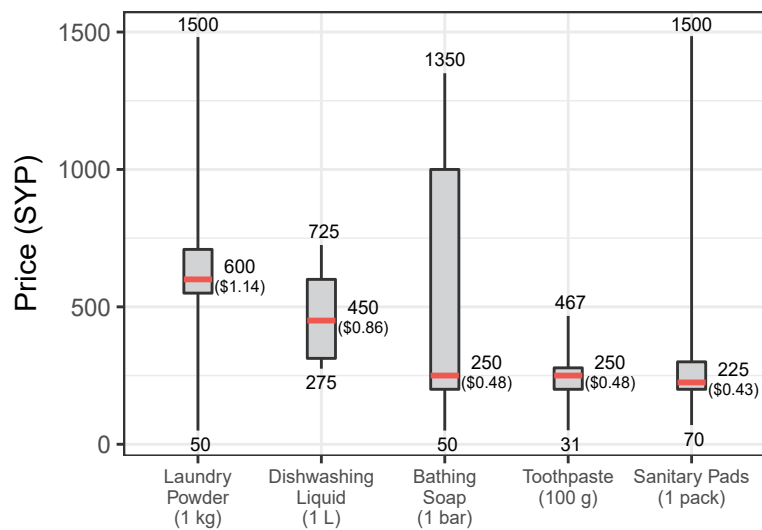


Distribution of Commodity Prices: Northeastern Syria

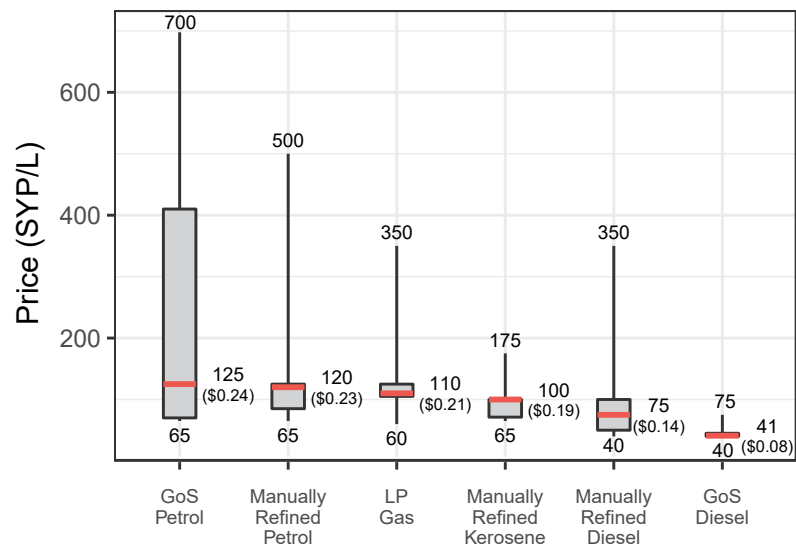
FOOD ITEMS



NON-FOOD ITEMS

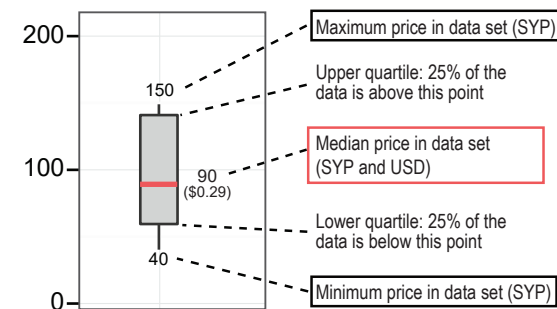


FUEL



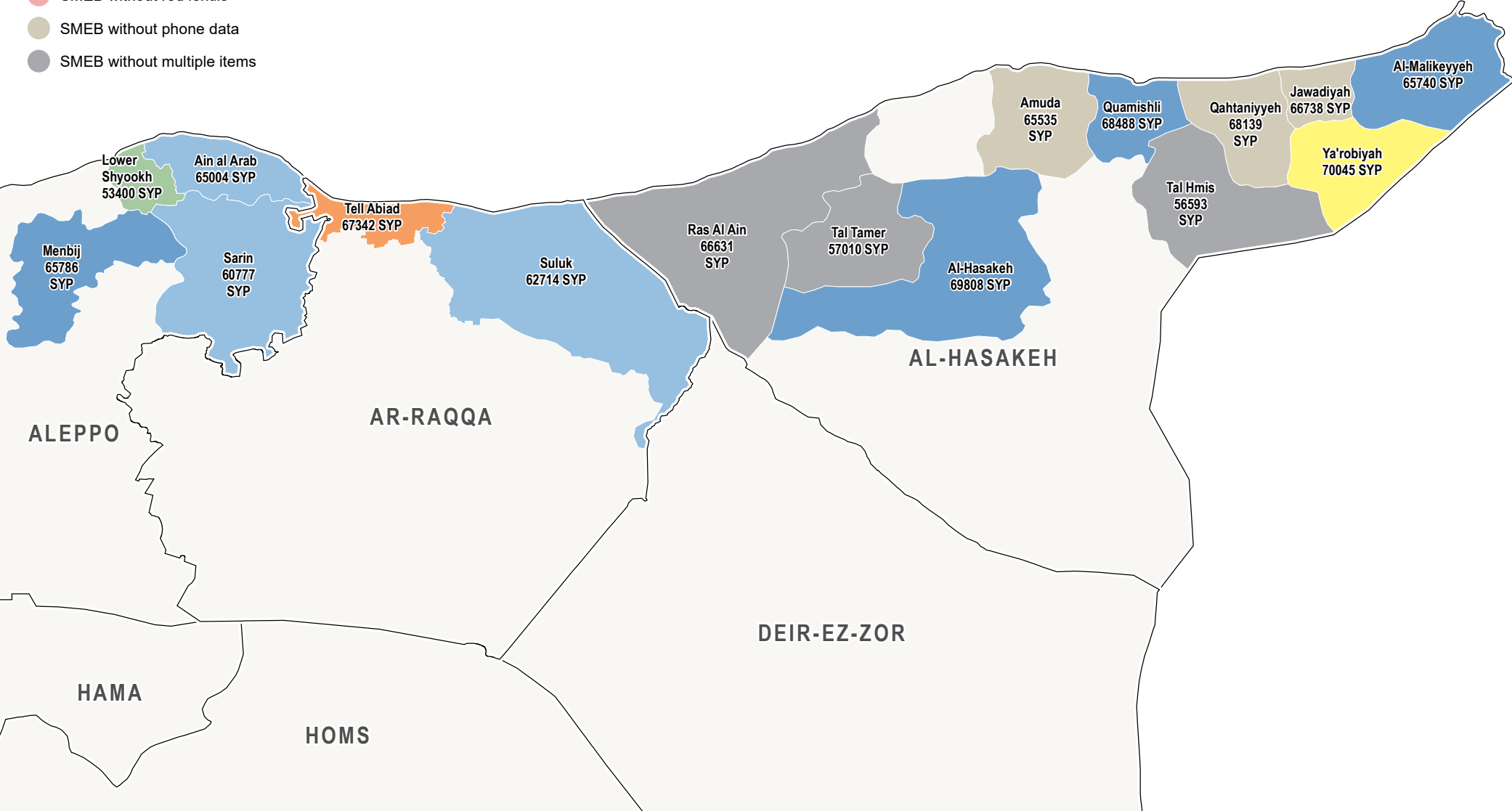
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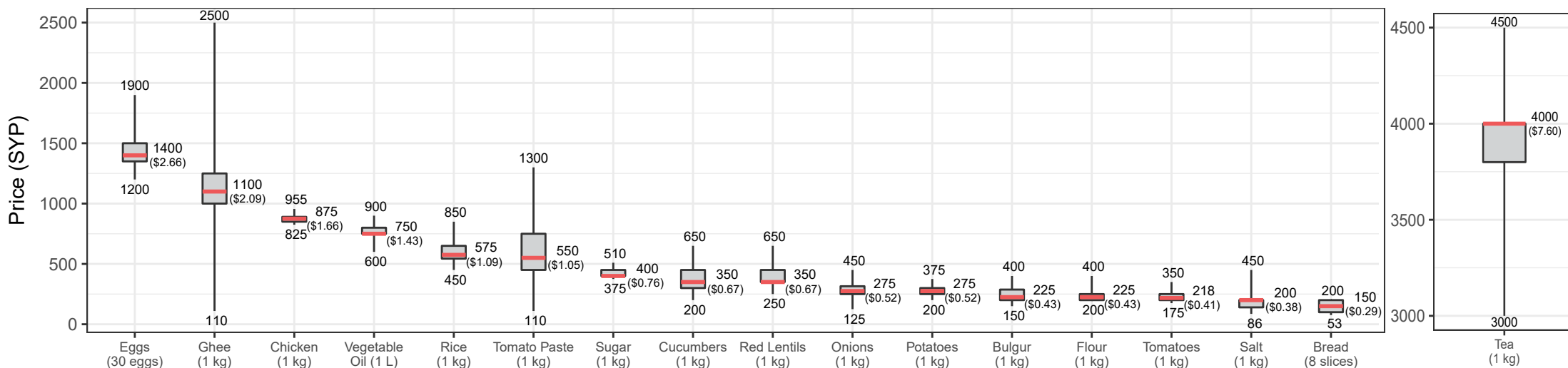
SMEB Prices: Northeastern Syria

- Complete SMEB
- SMEB without fuel
- SMEB without bread
- SMEB without chicken
- SMEB without red lentils
- SMEB without phone data
- SMEB without multiple items

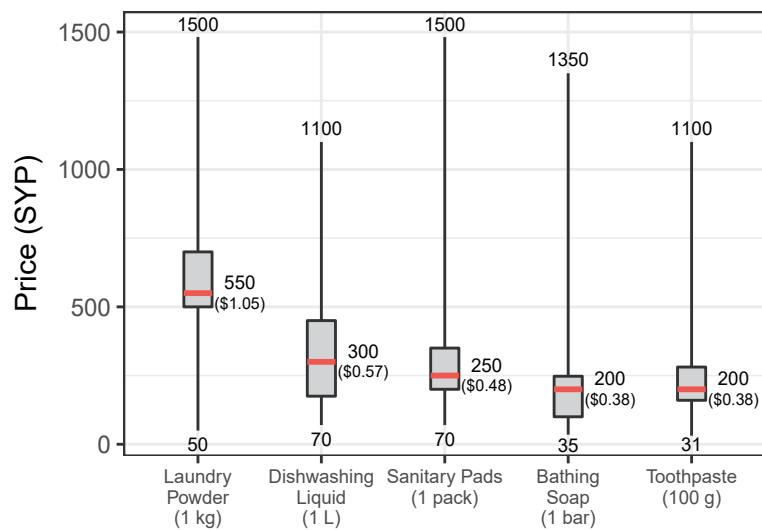


Distribution of Commodity Prices: Southern Syria

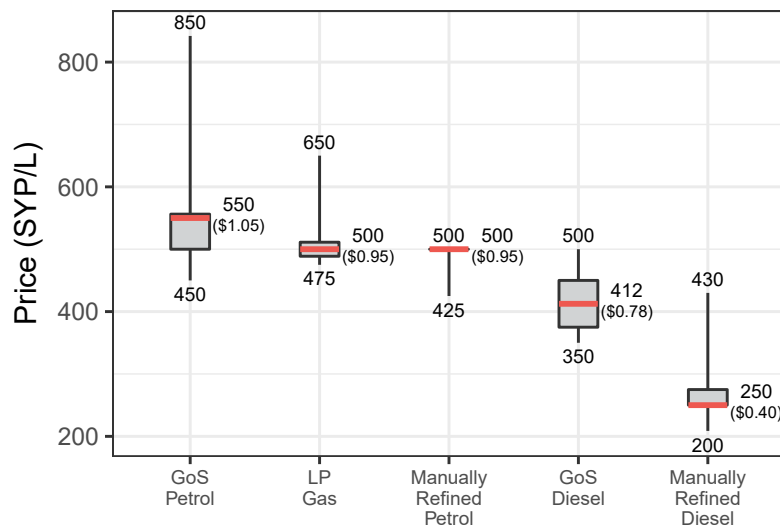
FOOD ITEMS



NON-FOOD ITEMS

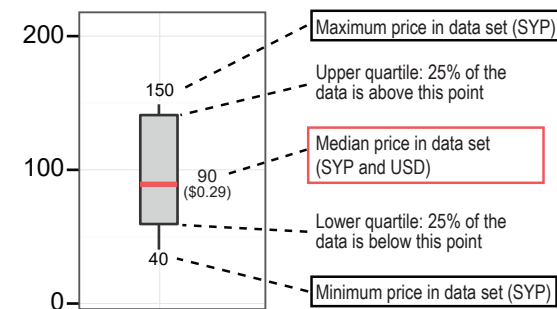


FUEL



How to read a box plot

Box plots provide a variety of data to aid in understanding the distribution of the data set. Prices are in SYP unless otherwise marked.



SMEB Prices: Southern Syria

- Complete SMEB
- SMEB without fuel
- SMEB without bread
- SMEB without chicken
- SMEB without red lentils
- SMEB without phone data
- SMEB without multiple items

